

**QUESTIONS AND ANSWERS BY POTENTIAL BIDDERS  
FOR RFP #2018-01 CMS PROJECT MANAGER**

*Updated April 20, 2018*

**1. Are the rates open for this position or do we need to submit the costing as per our Agreement with the Superior Courts of California?**

If referring to the master agreement with Los Angeles County Superior Court, the pricing set forth in that agreement is applicable to Shasta County Superior Court through the agreement's public agency clause. In order to submit a competitive bid, the proposal should utilize the master agreement pricing for any of the same services covered in RFP #2018-01, or may submit pricing lower than the master agreement. If referring to a different agreement, and the agreement contains a public agency or "piggy back" clause which would permit Shasta County Superior Court to obtain the pricing set forth in the agreement, the proposal should utilize that agreement's pricing (or a lower pricing) for maximum competitiveness.

**2. Do we need to submit separate rates in our cost proposal for onsite and offsite locations?**

If the pricing being proposed encompasses different rates for onsite and offsite services, please identify both rates.

**3. We would like to get some clarification on the references part of this opportunity as the three references should be of the prime vendor or of the candidate which the prime vendor will provide?**

References of the prime vendor/bidder are sufficient. However, the proposal must contain a statement of qualifications for any proposed individuals who will be performing the project management work. (See RFP section 7.4)

**4. a. Whether companies from Outside USA can apply for this? (like, from India or Canada)**

Yes, but please note the bidder must submit proof of good standing and qualification to do business in California. (See RFP section 7.11.d). Additionally, bidder must submit acceptance of the terms and conditions within Attachment 3 – Standard Terms and Conditions (or submit proposed modifications). Paragraph 17.A.xi. within the Standard Terms and Conditions affirms that the vendor is not an expatriate corporation and is eligible to contract with the Court.

**b. Whether we need to come over there for meetings?**

It is strongly preferred that the vendor be available for meetings in person throughout the terms of the project, however, the Court will consider proposals explaining how meetings could be accomplished with the vendor offsite.

**c. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)**

Yes, but the vendor will be required to be onsite (at the courthouse in Redding, California) at least one full day per week. (See RFP attachment 1 – Scope of Services).

**d. Can we submit the proposals via email?**

No, the proposal may be mailed or personally delivered by the submittal due date, but facsimile or emailed proposals will not be accepted. (See RFP section 7.2)

**5. Can you please let us know if this solicitation is open to all vendors or is it open to pre-qualified vendors only?**

The request is open to all vendors.

**6. As part of the budget planning is there a maximum budget amount allotted for this project? And if so, could you please share the budget with vendors?**

A maximum budget amount has not been determined. The Court will be evaluating the proposals based on the criteria set forth in RFP section 9.0, which attributes 40/100 points to the proposed cost.

**7. Is there a preferred methodology the County of Shasta has adopted for project management: Waterfall VS Agile? If not, should vendors include a proposed methodology for the project management?**

The Court can work with either approach. This project is to implement a vendor specific Case Management System, not develop a new CMS. The chosen CMS vendor may have a preferred approach that will dictate. It is our understanding that most vendors are using the Agile approach.

**8. Is there an existing vendor managing the current CMS? If so, could you please share the name of the current vendor?**

Management of the current CMS is done in-house, utilizing Court IT staff.

**9. The minimum qualification states as follows: “Bidder must have proven experience managing enterprise-wide court or justice applications with integrated data between justice partners or other stakeholders.” Does this suggest that one must possess CMS experience specific to court or justice? If so, is there an existing vendor that The Superior Court has in mind?**

While the RFP does state bidder *must* have said experience, the Court did not intend to limit bidders to only those with CMS experience specific to court or justice. An addendum to the RFP will be posted making such clarification. The Court will consider proven CMS experience in project management for any CMS, but “experience in project management, particularly on assignments similar to the services required in this RFP” is one of the factors that will be considered in scoring bids.

**10. Will any points be awarded to vendors that have extensive knowledge and experience in project management for CMS, but not specific to court or justice?**

Yes.

**11. [The RFP Introduction states: “Incumbant in this position is responsibility for gathering user business and operational requirements, utilizing tools and effective project management to ensure that Court requirements are met in accordance with project deadlines, costs, quality expectations and other critical success factors.”]**

**Are the tasks of requirements definition and gathering included in the SOW for this project? It is not stated in Attachment 1, Scope of Services.**

The question is not fully understood as stated. The specific tasks for gathering user business and operational requirements are not stated on the SOW, and the Court is open to the manner in which a bidder proposes gathering the information.

**12. Has a CMS been selected?**

A CMS has not yet been selected for this Court. On February 5, 2018, the Judicial Council of California issued a Notice of Intent to Award that identified the following CMS vendors to be awarded a master agreement: 1) Journal Technologies Inc.; 2) Justice Systems Inc.; 3) Tyler Technologies; and 4) Thomson Reuters.

The Notice of Intent to Award can be viewed at: <http://www.courts.ca.gov/documents/TCAS-2017-05-JU-Intent-To-Award-Court-Case-Management-Systems-RFP.pdf>

**13. Has the [CMS vendor request for proposal] procurement been completed? If not, is assistance with procurement included in the SOW for this project? It is not stated in Attachment 1, Scope of Services.**

Yes, the CMS vendor procurement has been completed, which resulted in a Notice of Intent to Award in February 2018 (see question 12, above), but a specific vendor has not yet been selected for this Court. Assistance with procurement is not within the scope of services for this RFP (RFP #2018-01).

**14. Is there a list of likely CMS vendors yet? What is your planned approach to procure a CMS?**

Please see questions 12 and 13, above.

**15. Do you anticipate formalizing data interface agreements with your justice partners?**

Yes.

**16. Do you plan to migrate some or all data from JALAN? Will you expect the vendor to perform the migration?**

Yes, the Court plans to migrate some or all data from JALAN. The selected CMS vendor will expect the data to be given to them in a requested format, most likely flat files. The Court IT department will generate the data in the requested format. The CMS Project Manager will coordinate the efforts between the CMS vendor and the Court.

**17. Do you have team collaboration tools available, such as SharePoint or another online document storage system? Will vendors and external partners have access?**

No.

**18. Do you plan to implement the CMS for all case types simultaneously?**

Simultaneous implementation is preferred, but the Court will take into consideration the vendor's sequence recommendation if simultaneous implementation is not recommended. Implementation of all case types must be completed by December 2019.

**19. Are you also seeking services to adapt the court's business processes and perform change management in response to the significant changes brought about by the CMS implementation?**

Yes. (See RFP attachment 1 – Scope of Services, Specific Deliverables).

**20. In Attachment 3, Section 5.B, should there be a payment schedule and cost ceiling? Do you anticipate reimbursing on a deliverable basis?**

Attachment 3 is the service agreement to be signed by the selected contractor. The payment schedule and maximum cost will be inserted into Section 5.B based on the payment schedule proposed and agreed upon between the specific selected vendor and Court. While payment based upon deliverables is preferred and the usual method, the Court is open to payment schedules utilizing a different timing of payments.

**21. Will court staff be allocated time to meaningfully participate in this project, for tasks such as interviews, deliverable reviews, CMS demonstrations, etc.?**

Yes.

**22. Is there an incumbent vendor currently providing these services?**

No, please see question 8, above.

**23. What is the budget for this procurement?**

Please see question 6, above.

*The following Q&As were added April 26, 2018, as the potential bidder brought to the Court's attention that the questions were submitted timely, but not included in the April 20, 2018 update.*

**24. Can the Court please elaborate on what is meant by “remain available for assistance and training in using the system through January 2021” on page 1 of the RFP.**  
**i. Is it the Court's expectation that the selected project manager will conduct the training on the system, or oversee the vendor or train-the-trainer (TTT) sessions?**

The Court's expectation is that the project manager be available during the first year after implementation while Court staff learns the new CMS. Training will be provided by the CMS vendor, but the project manager is expected to coordinate, monitor and oversee the training to make sure it is accomplished timely and sufficiently.

**ii. What assistance does the Court anticipate needing?**

Court staff will need training on how to use the new CMS, and ongoing assistance with any problems or issues. The Court also anticipates bench officers will utilize the new system in the courtrooms, which will be a significant adjustment, with training on functionality necessary. The project manager should coordinate and address such training and issues with the CMS vendor and monitor resolution.

**25. Section 1.0 indicates the project manager “is responsible for gathering user business and operational requirements.” Do many of these requirements already exist, and were they included in the Request for Purchase for the CMS? If so, please describe additional work needed to gather requirements. Is this a matter of ensuring that the selected vendor addresses these requirements through the implementation (configuration and customization) of the proposed system?**

Business and functional requirements already exist, but verification that the selected system addresses each requirement is necessary. A few requirements may need to be negotiated after vendor selection. The Court expects the project manager to ensure the requirements are met through implementation.

**26. Does the Court expect to have selected and contracted with the preferred CMS vendor prior to June 2018?**

The Court is hopeful that the CMS vendor will be selected and contracted with in the months immediately following passage of the State budget in June.

**27. Will the Court accept alternatives to the one full day per week on-site requirement (e.g., multiple days in a given week to support vendor onsite activities, workshops, or meetings; no onsite presence on other weeks when little or no activity is occurring onsite (i.e. the vendor is working offsite to install, configure, or customize the system prior to the next onsite meetings))?**

No. We anticipate a weekly presence will be necessary.

**28. Does the Court have a budget for the project management services? If so, would you be willing to share it?**

Please see question 6, above.

**29. Are responses limited to vendors that are on the master agreement (such as with the Los Angeles County Superior Court), or can any firm propose?**

The request for proposals is open to all vendors, not just those with a master agreement through another court entity.